Wealth Alliance

FINANCIAL FREEDOM STARTS HERE

YOUR CLIENT ACCOUNT

A TRANSPARENT INSIGHT INTO YOUR FINANCES, INSTANTLY ACCESSIBLE AND ALL ONLINE

- your pensions, savings and investments
- all online, in one place
- information at your fingertips, 24/7
- visibility and control for you
- an end to lorry loads of paperwork

LET'S GET STARTED

WHY NOT DOWNLOAD OUR APP?

It lets you manage your account on tablet or smartphone.

Available to download once you're all set up. Simply search for "Wealth Alliance" in your app store.

WHAT TO EXPECT

1. OPENING YOUR ONLINE ACCOUNT

Like opening any account, we need some information to get you set up and arrange your login details. We'll do that once we've received:

- Your completed plan application form, including your mobile number and email address.
- Your personal ID documents (if we haven't already seen these).
- The money you are investing

2. GETTING STARTED

Once all the arrangements are made, we'll send you a temporary password by text, and a Self Service ID and link to your account by email. At first login you'll be asked to change your password to something more memorable for you, and you're ready to go.

Your temporary password for your Wealth Alliance account is CVCXEFUQ (case sensitive). It expires in 5 days and replaces all previous passwords.

From: info@wealth.ie
To: joebloggs@abc.ie
CC:
Subject: Wealth Alliance account log on details

Thank you for choosing Wealth Alliance to look after your financial needs. Your new Self Service ID for access to your client account is 1234567890. You can use your Self Service ID or, if you prefer, your email address to log in.

3. LOGGING IN

Once you are set up, simply use your Self Service ID (or email) and the password you've set, accessing your account through the email link we sent you.

Even better, use our app. It includes a fingerprint login feature, giving you added security and peace of mind.

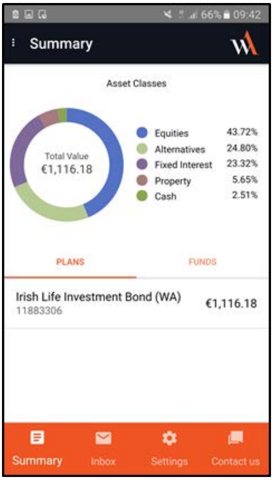
USING YOUR ACCOUNT

A key benefit of your account is visibility and control over all your investments, in one place.

Here are some of the things you can do.

Check your latest portfolio value

It's natural to want to keep track of how your portfolio is doing and its current value. Your account lets you do that any time, through a clear, visual summary of your finances.



Review your funds

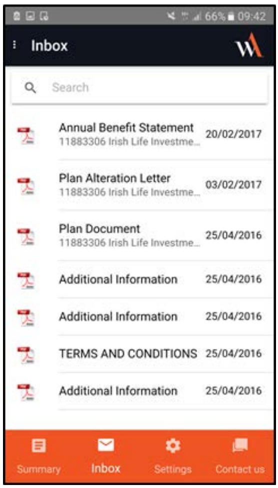
It's easy to look up details of the funds you are invested in.

Keep things up to date

From your personal details to the notifications we send you, your account gives you visibility and control.

Access all of your plan documents

Your account includes a secure online document that over time also builds up a complete record of all your portfolio documents, from records of our initial conversations to your annual statements.



THE PAPER-FREE APPROACH

We'll set your online account to be paperless unless you specifically tell us you want your ongoing documents to be sent to you in the post.

Why? Because it's an environmentally conscious choice and it means you'll always get instant access to your documents as soon as they are available.

No more waiting for the post to arrive.

KEEPING YOU INFORMED

You can log in to your account at any time, but to make sure you don't miss anything important we will send you an email and a notification each time a new document is uploaded for your attention.

It's all part of our modern, flexible investment service. Get in touch to find out more.

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Wealth Alliance Limited is regulated by the Central Bank of Ireland.
Information is correct as at 01 June 2017